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INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

CABLE NAMED FIRST AMENDMENT PLAYER, BUT BOUNDARIES UNCLEAR

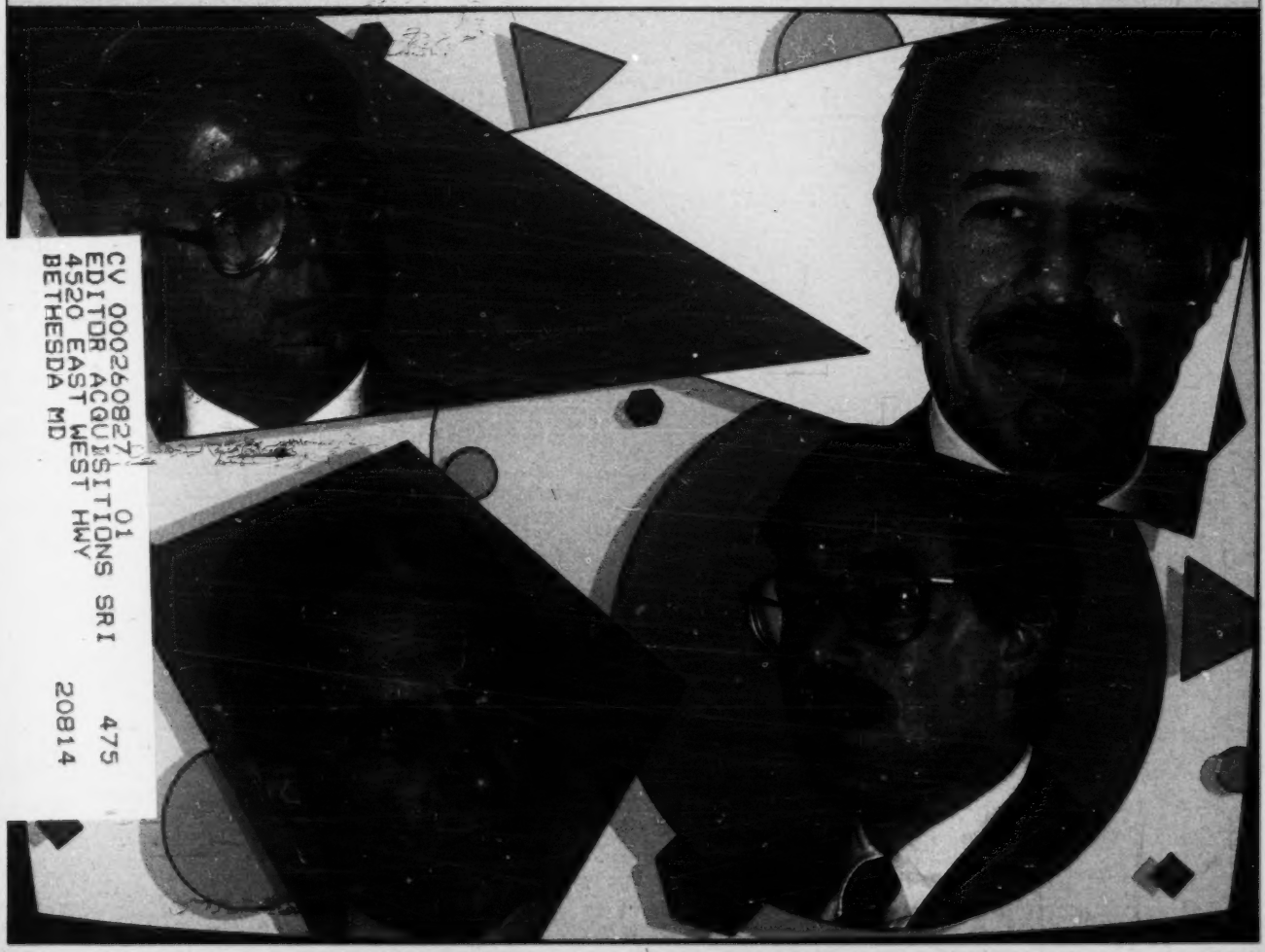
PAY SERVICES' DEALMAKING WAR RAGES ON

OPERATOR PROGRAMMING AWARENESS SEEN AS MARKETING KEY

ANI AND PPV WORKING FOR CENTEL

IS CABLE WINNING BATTLE ON URBAN FRONTIER?

JUGGLING PIECES OF A BIG MANDATE: CTAM LEADERS MAP AGGRESSIVE PLAN



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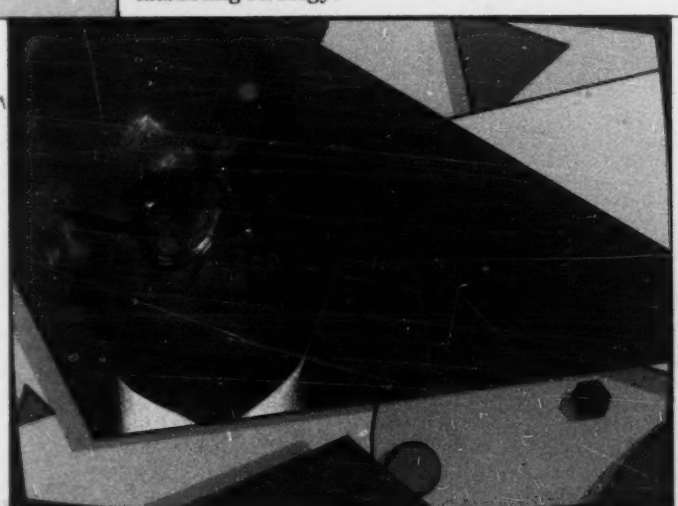

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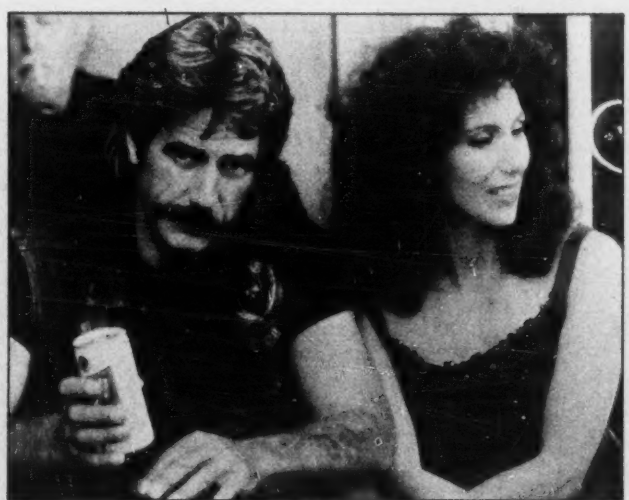
Film product comparison—July

Film	Pay Networks					Distributor
American Dreamer	HBO				(MAX)	CBS
Antarctica	(HBO)			HTN		20th Century-Fox
Apology	HBO					Peregrine
Ask Any Girl		ST			(MAX)	MGM/UA
Asphalt Jungle, The			TMC			MGM/UA
Avenging Angel	(HBO)				MAX	New World
Badlanders, The			TMC		(MAX)	MGM/UA
Bay Boy, The	HBO				(MAX)	International
Beverly Hills Cop		ST				Paramount
Big Hand For The Little Lady, A			TMC	HTN*		Warner Bros.
Bill Cosby, "Himself"	(HBO)	(ST)		HTN		20th Century-Fox
Blazing Saddles		(ST)	TMC		(MAX)	Warner Bros.
Body Double	HBO				(MAX)	Columbia
Bostonians, The	(HBO)		TMC*			Almi
Brass Ring, The	HBO	(ST)	TMC*			Film Gallery
Brewster's Millions	(HBO)	(ST)	TMC*	(HTN)	(MAX)	Universal
Bring On The Girls				HTN*		Universal
Bustin' Loose	(HBO)	(ST)	TMC		(MAX)	Universal
Cannonball Run, The	HBO*				(MAX)	Galaxy
Cannonball Run II, The	HBO*		(TMC)	(HTN)	(MAX)	Warner Bros.
Careful, He Might Hear You	(HBO)	(ST)		HTN		20th Century-Fox
Cat's Eye	(HBO)			HTN*		MGM/UA
Certain Fury					MAX	New World
Cheech & Chong's The Corsican Brothers	HBO					Orion
Cheech & Chong Still Smokin'		ST				Paramount
Christina					MAX	Playboy Productions
Cimarron (1960)		ST	(TMC)		(MAX)	MGM/UA
Cloak & Dagger	HBO		(TMC)	HTN*	(MAX)	Universal
Clown, The			TMC			MGM/UA
Code Of Silence	(HBO)				MAX*	Orion
Come Fly With Me		ST				MGM/UA
Confessions of A Driving Instructor					MAX	Columbia
Corn Is Green, The	HBO					Warner Bros.
Deep, The	HBO				(MAX)	Columbia
East Side, West Side					MAX	MGM/UA
Felicity		ST*				Satori
Final Option, The	(HBO)		TMC*			MGM/UA
Final Terror, The	(HBO)	ST*				Arkoff Int'l
Fire In The Stone		(ST)		HTN		Tolchin Films
Firestarter	(HBO)	(ST)	TMC		(MAX)	Universal
Firstborn		ST	(TMC)			Paramount
Flash of Green, A					MAX	Int'l Spectrafilm
Fleshburn			TMC			Crown
Fletch	(HBO)	(ST)	(TMC)	HTN*	(MAX)	Universal
Footloose		ST	TMC*			Paramount
Forced Vengeance	HBO				(MAX)	MGM/UA
Fraternity Vacation	(HBO)				MAX	New World
Funny Lady	HBO					Columbia
Gang's All Here, The					MAX	20th Century-Fox
Ghostbuster's	HBO*				(MAX)	Columbia
Ghoulies	(HBO)				MAX	Vestron
Girls Just Want to Have Fun	HBO					New World
Girls of The White Orchid	HBO					King Features
Grease		ST*	TMC*		(MAX)	Paramount
Greystoke	(HBO)	(ST)	TMC	HTN*	(MAX)	Warner Bros.
Hambone & Hillie	HBO		(TMC)	(HTN)	(MAX)	New World
Heaven Help Us	HBO					Silver Screen
Heavenly Kid, The					MAX	Orion
Heidi		(ST)		HTN*		20th Century-Fox
High School USA	HBO*					King Features
Home In Indiana					MAX	20th Century-Fox
Hotel	HBO					Warner Bros.
Hot Resort		ST				Cannon
Iceman	(HBO)	ST	(TMC)	HTN*		Universal
Initiation, The		ST				New World
Intermezzo				HTN*		ABC Video
Invisible Boy, The		ST				MGM/UA
In Which We Serve		ST				New Century
I Own the Racecourse		ST				Transcon
It Happened at the World's Fair		ST				MGM/UA
King In New York, A				HTN		20th Century-Fox
Last Warrior, The				HTN		Warner Bros.
Lifeforce					MAX	Tri-Star
Little Darlings					MAX	Paramount
Lolita			TMC			MGM/UA
Losin' It	(HBO)		TMC		(MAX)	Embassy
Lost And Found	HBO					Columbia
Lost Empire, The		ST				J.G.M.
Lost In America	(HBO)	ST*	(TMC)			Warner Bros.
Love Child	HBO	ST			(MAX)	Warner Bros.
Lovelines	HBO					Tri-Star
Loving Couples	HBO					TLF
Lucky Night		ST				MGM/UA
Mad Max Beyond Thunderdome	HBO	ST	TMC		MAX	Warner Bros.
Mae West	(HBO)	ST				King Features
Major Barbara			TMC			New Century
Malibu Express					MAX	Malibu Bay
Man From Button Willow, A		ST	TMC			Les Haber Prod.
Man With One Red Shoe, The	HBO	ST				20th Century-Fox
Mask	HBO	ST	TMC		MAX	Universal
Massive Retaliation	(HBO)			HTN		The Movie Store
Meatballs Part II	HBO					Tri-Star
Micki & Maude	HBO*				(MAX)	Columbia
Midnight Express	HBO	(ST)	(TMC)		(MAX)	Columbia
Mikey & Nicky			TMC*			Paramount
Missing In Action	(HBO)	(ST)			MAX	Cannon
Missing In Action II	(HBO)	(ST)	(TMC)		MAX	Cannon
Model Behavior		ST*			(MAX)	Ho-Tel Inc.
Modern Times				HTN	(MAX)	20th Century-Fox
Music Lovers, The			TMC			MGM/UA
Mystery Mansion	(HBO)	ST				Pacific Int'l
1984	(HBO)		TMC*			Atlantic
Neighbors	HBO		(TMC)		(MAX)	Columbia
New Kids, The	(HBO)				MAX	Columbia
Nightmare On Elm Street, A	HBO	(ST)			(MAX)	New Line
Night of The Comet				HTN	(MAX)	Atlantic
Night Patrol	HBO					New World
Nightwing	HBO					Columbia
Odd Man Out			TMC			New Century
Oh, Alfie!			TMC			Earthbeam
Over The Brooklyn Bridge	HBO					Cannon
Oxford Blues	(HBO)	(ST)	(TMC)	HTN*		MGM/UA
Pale Rider	HBO	ST	TMC			Warner Bros.
Passage To India, A	(HBO)			HTN		Columbia
Police Academy	(HBO)	(ST)	TMC		(MAX)	Warner Bros.
Pope of Greenwich Village, The		ST*			(MAX)	MGM/UA
Private Potter		ST				MGM/UA
Prizzi's Honor	HBO	ST	TMC			Universal
Protocol	HBO*			(HTN)	(MAX)	Warner Bros.
Razor's Edge	HBO				(MAX)	Columbia
Rebecca				HTN*		ABC Video
Reluctant Debutante, The					MAX	MGM/UA
Revenge of The Nerds	HBO	ST			(MAX)	20th Century-Fox
Rhinestone	(HBO)	ST	(TMC)	HTN*	(MAX)	20th Century-Fox
Richard Pryor Live In Concert	(HBO)	(ST)	TMC			Gary Biller
River, The	HBO	(ST)		HTN*	(MAX)	Universal
Rocky	(HBO)	(ST)	(TMC)	HTN*	(MAX)	MGM
Romancing The Stone	(HBO)	(ST)	(TMC)	HTN*		20th Century-Fox
Rosebud Beach Hotel, The	HBO*					Almi Pictures
Rustler's Rhapsody		(ST)	TMC			Paramount



Sam Elliott and Cher star in 'Mask,' which makes its pay cable debut this month.

'Prizzi's Honor' starring Anjelica Huston also makes its pay cable debut this month.

'Mad Max Beyond Thunderdome' starring Tina Turner makes its pay cable debut in July.

Film	Pay Networks					Distributor
Saint Elmo's Fire	HBO*					Columbia
Second Hand Hearts	HBO					Lorimar
Secret of Nimh, The	HBO	ST		HTN		MGM/UA
Sidekicks			TMC			Warner Bros.
Silent Rage	(HBO)				MAX	Columbia
Sinful Davey			TMC			MGM/UA
Skekie	HBO					King Features
Slow Burn		ST*				Showtime
Soldier's Story, A	HBO*					Columbia
Sombrero		ST				MGM/UA
Some Kind of Hero			TMC		(MAX)	Paramount
Spring Fever			TMC			Tournament
Starman	HBO*				(MAX)	Columbia
Star Trek III		(ST)	TMC*			Paramount
Steel	HBO			HTN*	(MAX)	Steel Co.
Stone Boy, The			(TMC)	HTN*	(MAX)	20th Century-Fox
Story of The Dolls, The					MAX	Platinum
Streets of Fire	HBO		TMC*	(HTN)	(MAX)	Universal
Sunday, Bloody Sunday			TMC			MGM
Surf II		ST			(MAX)	Film Gallery
Sword of The Valiant		ST	TMC		(MAX)	Viacom
39 Steps, The			(TMC)	HTN		S. Goldwyn
Tank	(HBO)	(ST)	TMC	(HTN)	(MAX)	Universal
Tell Me That You Love Me	(HBO)			HTN		The Movie Store
Terminal Choice	HBO	ST				Almi Pictures
Tex	(HBO)	ST	(TMC)	(HTN)	(MAX)	Touchstone
Three Little Words			TMC			MGM/UA
Topper		ST	(TMC)			Hal Roach
Toy Soldiers			TMC			New World
Trancers	HBO					Vestron
Tunes of Glory			(TMC)		MAX	New Century
Twilight Time	HBO		TMC			MGM/UA
Two Weeks In Another Town			TMC			MGM/UA
Under The Volcano	(HBO)		TMC			Universal
Untamed				HTN*		Universal
Until September		ST	(TMC)			MGM/UA
Ups and Downs		(ST)	TMC			David Armstrong
Utilities			(TMC)	HTN		The Movie Store
Vamping			TMC*			Atlantic
View To A Kill, A	(HBO)			HTN*	(MAX)	MGM/UA
Way Out West		(ST)	TMC			Hal Roach
Who's Afraid of Virginia Woolf			(TMC)	HTN*		Warner Bros.
Wildrose	HBO					Troma
Wise Blood			TMC			New Line Cinema
Wizards			TMC*			20th Century-Fox
Woman In Red, The	HBO				(MAX)	Orion

Cable Network Legend:
HBO-Home Box Office
ST-Showtime
TMC-The Movie Channel
HTN-Home Theater Network
MAX-Cinemax

- Networks in parentheses indicate carriage in February, March, April, May and/or June.
- An asterisk indicates the film is a carry-over from February, March, April, May and/or June.
- In total, 176 films appear on the July schedules of Home Box Office, Showtime, The Movie Channel, Home Theater Network and Cinemax. Of those titles, during the last six months, six have played on all five services, 15 have played on four of the five services, 22 have played on three services and 56 have played on two of the five services. Seventy-seven titles were unduplicated in the last six months.
- The motion picture distributor with the most titles on pay TV this month is MGM/UA with 29, followed by Columbia with 17, Warner Bros. with 15 and 20th Century-Fox and Universal with 14 each.
- Titles subject to change.

Mirage or reality?

Some see breakthrough in urban cable, but penetrations remain low

By Virginia Munger Kahn

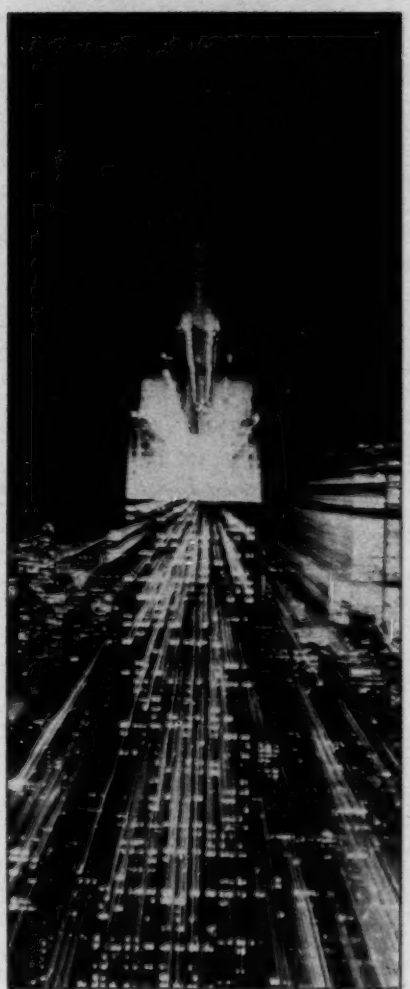
On the surface, despite the many contract dispensations won by operators in the urban cable environment, big-city cable remains a rough way to make a buck. But evidence abounds that the urban frontier, where many believe the future of the industry is at stake, will be tamed, thanks in large measure to lessons learned from the hard knocks of early going in the major newbuilds of the '80s.

Fortunately for the industry, the evidence on the plus side is being taken to heart by the financial community at a time when completion of the massive American urban wiring project has been threatened by repeated delays in getting the remaining city newbuilds underway. With virtually every unwired city in the U.S. now assured of the funding to get the job done, the industry can look forward to having the essential household base from which to make its drive for the top rung in television.

The availability of these funds, for so long questioned by outside observers who kept asking over the past two years whether Philadelphia, Washington, D.C., Cleveland, Chicago, New York, et al would ever get built, is a remarkable development. Few of the urban systems completed in the past three years are anywhere close to profitability. The return on investment that makes a project finally worth capital costs is still five to seven years down the road for most of these operations, and penetration levels remain discouragingly low—rarely rising above 40 percent in systems completed within the past two years.

Yet there is a generally upbeat assessment of urban cable today echoed by many operators and industry observers. They credit significant changes in the relationship between cities and cable companies for much of the improved outlook, along with the growing base of knowledge within the industry on how to operate in this unique environment.

"My impression from talking with other cable operators in major markets," said Steve Kniffin, president of Mile-Hi Cablevision in Denver, "is that each system is different and that they (cable operators) are on a learning curve." In other words, operating a big city system in Seattle is different from operating one in Denver or one in Dallas, that the industry is just now beginning to accumulate the knowledge it will need to make these systems successful.



New York

That the marketplace has changed is evident in the newbuilds that are undergoing construction now compared to those that were bid and won in the early 1980s. Unshackled from onerous requirements for huge capital outlays in the form of I-Nets, access facilities and dual cable plant, newbuilds in Milwaukee and the outer boroughs of New York City are viewed favorably by the financial community.

"There are an awful lot of attractive newbuilds out there now," said one banker. While the Milwaukee cable system under construction by Warner is not cash flow positive yet, it is ahead of projections and "a huge, huge success," this source said. The outer boroughs of New York also are "a very attractive market" for the company, she said.

John Reidy, a long-time industry analyst with Drexel Burnham & Lambert, also is bullish on the future of cable in the urban environment, seeing it provide an "attractive internal rate of return in the low teens" not only as a result of successful basic and pay services but also because of new services like home shopping channels and movie channels contemplated by companies such as TCI for some of its major markets. However, he cautioned that this rate of return would not include the initial investments made in some of these systems. While he said that investment, which in many cases has been prodigious, could not be ignored, he considered it a "sunk cost" and that "what counts now is the return in the future. If you've already spent the money, you can do just as well holding onto the property as selling it and investing elsewhere," he said.

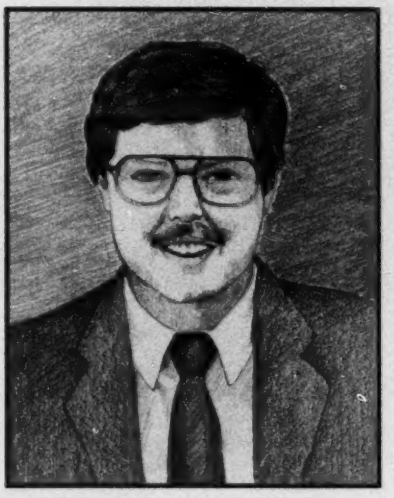
Community needs

The choice has always been one of simply selling off the system and swallowing the losses or holding on to the system and hoping to recoup at least some of that initial investment by turning it into a profitable operation. Bill Bresnan, who heads up his own cable company today and is the former head of Group W Cable, noted that several of the systems the company considered "real trouble spots" in the 1960s such as Seattle and the Bay

"GROWTH"

"We believe much of our growth in recent months is due to switching back to SuperStation WTBS.

We had taken it off in 1983 because of the 3.75 CRT, but subscribers kept asking us to bring it back. They especially wanted the sports, because Billings is a big baseball community. So in October, 1985, we switched off a distant independent and switched SuperStation WTBS back on. It's created a lot of good will from other business people and city leaders, not to mention the good effect on customer relations. It's been a big plus."



Les Harris, System Manager
Montana Video (TCI)
Billings, Montana

MAKE THE SWITCH THAT MAKES A DIFFERENCE.

SuperStation WTBS

©1986 Turner Broadcasting System, Inc.

Area in San Francisco have since turned into highly profitable operations.

Just how real the turnaround in the industry's urban fortunes has become in the eyes of insiders was demonstrated late last year in the effort mounted by Warner Amex executives to acquire the company's cable operations. Just two years earlier, those executives, including Drew Lewis, Jack Messman and John Fowler, had walked into a company bleeding $150 million in red ink, primarily as a result of poor performance at seven large metropolitan cable systems. Not only did they have confidence that the corner had been turned to the point they were willing to put capital on the line to gain control of the company; Warner Communications also had a bouyed outlook, to the point that the company chose to stay in cable, urban sysems and all, leaving the would-be bidders out of luck.

While Warner sold off its two most troublesome major city newbuilds—Pittsburgh and Dallas—it has clearly reached the conclusion that from here on, returns on investments in its other big systems promise to be at least as good as those it would garner by selling off those systems and putting the money elsewhere. Moreover, for the buyers of Warner's systems in Pittsburgh and Dallas—Tele-Communications Inc. and Heritage Communications, respectively—those businesses are already perceived as improved with expectations high that they will generate solid returns.

But, while most observers and industry participants are optimistic about the future, outward signs point to a slow and difficult climb out of the urban cable basement.

For example, among eight cable systems surveyed for this article there were penetration rates of 18 percent for the Miami cable system, 26 percent for Denver's Mile Hi system, 28 percent for Minneapolis, 30 percent for the Copley/Colony system in Los Angeles and 38.5 percent for the Houston cable system. All of these newbuilds were completed in 1985 or 1986. While an executive with the Miami system noted the entire franchise has not yet been marketed, representatives from each of these systems expressed disappointment with the numbers.

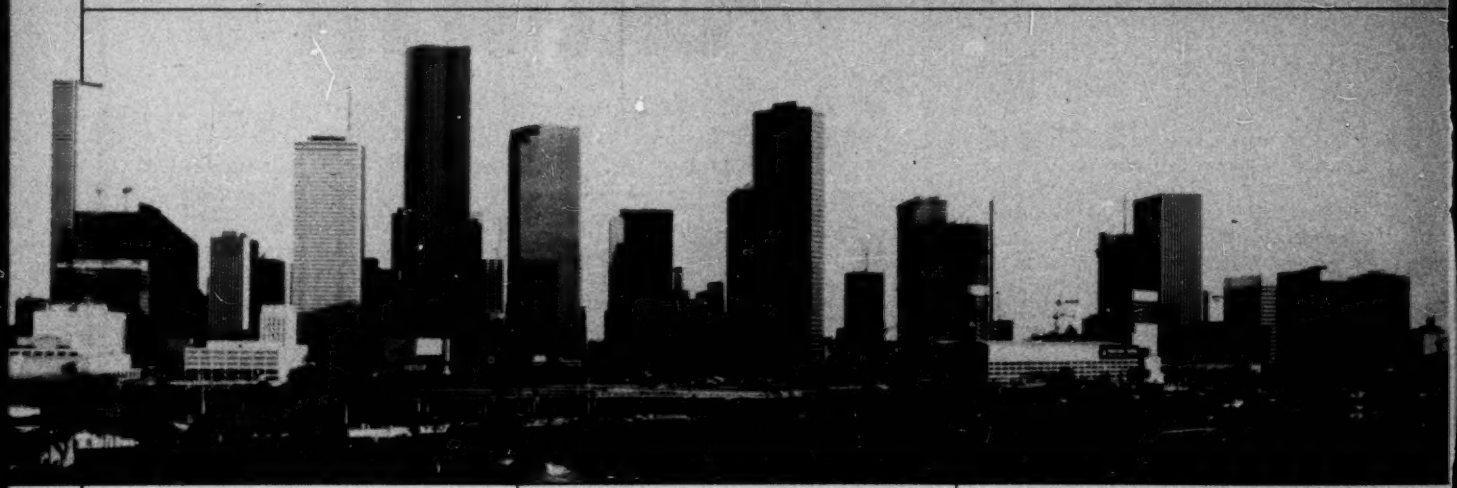
However, trends evident in the two older cable systems in the survey—Pittsburgh and San Antonio—and the newest addition to the survey—the Scripps Howard system in Sacramento—are encouraging. In the case of Pittsburgh, penetration rates have risen to 51 percent over the past 18 months since TCI took over the system, after remaining flat at 45 percent during the last year of ownership by Warner Amex. San Antonio also boasts a penetration rate slightly above 50 percent in its cable system, construction on which was completed in 1981. The industry average for penetration as a function of homes passed is 56 percent, according to *CableVision* statistics.

8 Urban Systems at a Glance

	Franchise Let	Const. Completed	Plant Mileage	Potential Households	Basic Subs	Pay to Basic Ratio
San Antonio/Rogers	1978	1981	3,096	400,000	201,000	142%
Houston/Warner	1979	1984	4,500	500,000	192,500	114%
Pittsburgh/TCI	1980	1984	830	165,000	84,517	130%
Miami/TCI and Americable	1981	1985	624	140,000	25,000	120%
Denver/ATC; Daniels	1982	1986	1,200	300,000	52,000	145-150%
Minneapolis/Rogers	1983	1985	633	130,000	47,000	85%
Los Angeles/ Copley; Colony	1983	1985	800	40,000	12,000	191%
Sacramento/Scripps Howard	1983	1988 (Targeted)	3,000 (When Completed)	400,000	16,714	—

Superb relationship

Moreover, the Sacramento system is starting out on the right foot with a 45.2 percent penetration rate among homes that have been marketed. Dick Davis, the system's new chief executive officer, and the former general manager of Warner Amex's Dallas cable system, credits the company's performance to a "superb" relationship with the city, service offerings that are simple to understand, an experienced staff and a receptive market. Unlike many urban systems, the population and economy in Sacramento are con-



Houston

sidered stable, and there are fewer distractions in Sacramento than other cities, said Davis. With just 20 percent of the total 3,000-mile plant built at this time, Davis said the company expects to break even on a running cash flow basis in August, and cash flow margins should hit 36 percent to 38 percent by the end of next year.

The healthier penetration rates for San Antonio and Pittsburgh represent an obvious point when considering the performance of the newer cable systems, namely, it takes time to build a subscriber base. The classic cable sytems that today boast penetration rates above 60 percent did not start out at those rates.

Many urban cable operators, however, are not satisfied with that explanation, saying even though it takes time to develop a cable system, penetration rates have been less than what their companies had hoped for. "We were definitely hoping for more," said Jay Van Riper, general manager at Copley/Colony's Los Angeles Harbor systems, where penetration rates on the three-year old system hover around 30 percent. At this point in its development, the system's owners figured penetration rates would be up in the 40 percent to 50 percent range.

Van Riper blames the low rate on the system's failure to provide its market with attractive programming. Approximately 60 percent of the system's potential customers are Hispanic. "We essentially don't have anything on basic that satisfies their needs," said Van Riper, noting that the system's high pay-to-basic ratio of 190 percent is due primarily to heavy penetration of Galavision. In order to try to meet those needs, Van Riper is planning to roll out more local origination programming. And, in a novel twist to audience research, the system called in owners of local video stores to find out what the community rented most often. "They've been very cooperative," he said.

Tapping into the large Hispanic market in San Antonio is also the goal of the Rogers cable system there. While the system boasts a penetration rate of just over 50 percent, Missy Goerner, director of programming for the system, noted that the Hispanic population is substantially under-represented in the system. Hispanics constitute 54 percent of the city's population, but only 35 percent of Roger's subscribers. "For an urban market, we think we're well penetrated, but we feel we should be able to pass 60 percent penetration," she said.

Trouble spots

In fact, the ability to market to diverse ethnic groups is probably one of the most difficult challenges confronting cable operators in the urban market these days. In many new systems, from Los Angeles to Miami, catering to the needs of these communities has involved a slow learning process. For example, operators have had to learn how to print program guides in both English and Spanish, hire bilingual customer service representatives, and seek new programming that will satisfy that community's particular needs.

Missy Goerner

A multitude of other reasons are cited for low penetration rates, some of which are generally true of the urban market and others of which affect specific systems.

In the case of Warner's Houston system, generic and specific factors coverge to make a difficult operating environment. Like many cities, there are a plethora of over-the-air broadcast stations, numbering 10 in Houston's case. Also, like many cities, churn and move rates play havoc with the system's attempts to attract and maintain subscribers. The system reportedly experiences a move rate of 34 percent a year, which means that 65,000 subscribers have to be replaced annually.

In addition, the economy in Houston has taken a nosedive over the past year and the effects on the cable system have been severe. According to system spokesman Jim Leach, when Warner first started operating in the city in the early 1980s, the household occupancy rate was in the 90 percent or better range. Today, approximately 15 percent of the homes passed by Warner are vacant. Leach estimates that if the penetration rate was calculated based on homes occupied rather than homes passed, the system's level would be a more respectable 46 percent rather than 38.5 percent.

But, despite the less than ideal environment, Houston cable generates some $64 million a year in revenues and $20 million a year in cash flow, for a margin of 31 percent. Average revenue per subscriber hovers around the industry norm of $19.

While declining to confirm the figures, former Metro Division President John Fowler recently discussed what he considered the keys to turning around not only the Houston cable system, but other large urban cable systems for Warner as well. One of the most significant contributions Warner Amex has made to the cable industry, to the extent that it is picked up by others, said Fowler, has been to train managers to run these huge systems and to implement the policies and procedures for managing the large volumes of equipment and customers that accompany such large plants. In Houston, for example, the system received 100,000 phone calls a month and 500,000 work orders a year from its subscribers.

"When you take into consideration the phone calls, the move rate, the truck rolls, it's no longer the same type of system as that in Altoona," Fowler said. "It's a real industrial engineering problem. If you don't deal with the work orders, you create a backlog and your phone (calls) go through the roof. You can lose control. What we learned to do was to manage the volume."

Most urban cable systems have traditionally run through their general managers like they were going out of style. They think they're going to apply their experience to the urban system, but clearly, their experience in no way has prepared them for running a facility the size of Houston, Fowler said. Fowler admitted that Warner brought some of its problems on itself, but at this point in time, he contended, the Cincinnati and Houston systems are doing as well as any other system in terms oftheir financial and operational performances.

Capital commitments

Still another key area in turning Warner around, according to Fowler, was in re-evaluating the capital commitments the company made in terms of access studios and the Qube system, and then going back to the cities to renegotiate those commitments.

Studies conducted by Warner using Qube viewership monitoring techniques showed that viewership to the access channels was less than 10 minutes per week per household. Considering the tremendous sums of money that were committed to such facilities, it was clear those commitments had to be re-thought, said Fowler.

As far as the Qube system was concerned, "the technology changed" in the period from when the systems were first proposed and when the franchises were off and running, noted Fowler. While the technology proved "terrific" for status monitoring on the plant, the upstream drop to the home would be better served by a telco modem, he said. In fact, the Houston cable system has essentially pulled away from Pioneer's Qube two-way technology in favor of the installation of the manufacturer's one-way addressable system in many homes. Houston Cable's Leach said the change-out offers the system savings on its 500,000 truck rolls per year plus a plethora of marketing options, such as parental control, compatibility with VCRs and cordless remote control.

When TCI took control of the Pittsburgh system, one of the first things it did was to yank out the Qube system and replace it with a Scientific-Atlanta addressable box. Ironically, according to a spokesman for the Pittsburgh system, the personal contact involved in doing the change-out is credited with

Dick Davis credits the company's performance to a 'superb' relationship with the city.

"PENETRATION"

"Since we switched out a Boston affiliate for SuperStation WTBS, we've had a very positive response from subscribers. As part of our enhanced Basic package, WTBS helped increase penetration from 71% to 73%, in spite of a $2.00 rate increase.

SuperStation WTBS has been very aggressive in providing a top quality programming mix, including an excellent movie and sports package. Awareness in the market is high because of cross-promotion on CNN and Headline News. These cross-promotional opportunities help us do a good marketing job."

Jeff Darrell, Vice President-Marketing and Programming
Public Cable (ATC)
Portland, Maine

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increasing the system's penetration rates. He also credited the simplification of offerings for an increase in subscribers from 74,000 at the time of the sale to TCI in October 1984 to 84,517 today. "The personal contact was important, it reinforced good relations," he said.

Warner Amex executives are fond of pointing out that it was they who initially renegotiated the Dallas franchise, allowing Heritage to take over a system unburdened by unreasonable requirements and that had the Pittsburgh city government been willing to do the same they would have been able to make a success of that system as well. "We didn't know how successful we would be in renegotiating," said Fowler. "Had we known, we would have had $8 million to $9 million in cable cash flow (in Pittsburgh)... Certainly enough to pay off the plant. We had the revenue. We just needed to eliminate the expense."

Psychological pressure

But the fact was that the city government was not willing to let Warner Amex, in essence, break the contract it had signed with the city just four years earlier by allowing them to renegotiate the franchise. "You find that the city will do it for someone else, but not for the original franchisee," said Fowler. While Warner succeeded in putting psychological pressure on the city to approve the changes under threat of simply walking away from the system, in fact, Warner had few options in the Pittsburgh market, where the urban system was completely surrounded by suburban cable operations owned by TCI. This closed off whatever option Warner had for expanding into the suburbs to spread the system's capital costs over a larger subscriber base.

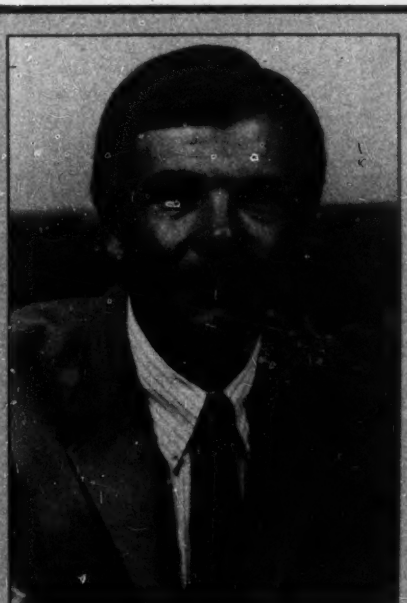
In the end TCI succeeded in getting the city to approve the transfer of the franchise while cutting back significantly on public access requirements and shutting down the second cable on the dual-cable system. Having paid $93.4 million for the system, on which Warner was said to have spent $100 million to construct, the Pittsburgh system is expected to pay off handsomely for TCI. In fact, according to Peter Barton, TCI senior vice president, Pittsburgh has already "turned out to be an enormously profitable acquisition" for TCI. After operating at a loss for several years, the system became cash flow positive within the first four months of the company's operation.

According to Barton, the city also has benefitted by not burdening the

system with millions of dollars in capital costs before the operation ran as a healthy business. "The city let us get our house in order," he said. "They spread some crumbs over the water, and now we're buying Pirates games and starting a super LO channel."

In fact, the change in the way that city governments deal with cable operators may be one of the most significant factors in bolstering industry optimism about the urban marketplace. All the operators contacted for this article said their relationship with the city has improved markedly over the past two years.

While some systems have had little trouble with their municipal regulators all along—such as Rogers' San Antonio system and Copley/Colony's Los Angeles system—most operators in major urban markets have gone through extremely tough times with their local government. Steve Kniffin, of Mile Hi Cable, which had a long running battle with the city council, noted relationships with city politicians need to be built just like the plant.



'The industry is just now beginning to accumulate the knowledge it will need to make these systems successful.'

—Steve Kniffin

"After the franchise is let, you have a lot of concepts about what it's supposed to look like, and so do they," he said. "It's a learning curve." As one banker noted, "The cities have realized that unless cable companies can make a decent return, they are not going to build" in these markets.

Key to improving the relationship, however, has been improved operating performances by the systems themselves. "When you're not delivering services to subscribers, the city gets very upset," noted Warner's Leach. Despite the fact that Houston is a good city to do business in because it undertakes very little regulation, Leach said the lack of rules, in fact, led to increased tension between the parties when the system was not performing well. Now that those service problems have been cleared up, said Leach, the relationship with the city has progresssed to the point where the issues under discussion are far more substantive, such as regulatory issues, rather than issues related to the system's inability to deliver services. "It's a natural progression," he said. "Once you get past the day-to-day, you make service a transparent issue."

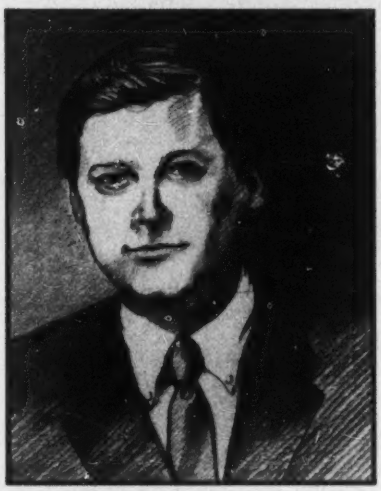
One system which has had little trouble with city regulators has been Rogers' San Antonio system. According to Goerner, not only has that been a function of a reasonable franchise—San Antonio was one of the first urban franchises granted—but for the last 10 years, the city has demonstrated a probusiness attitude with a very aggressive approach to drawing in new business. The cable company, in turn, has hired several former city staffers, who bring to the company a unique understanding of what the city wants and how it operates. Goerner herself is the former director of economic development for San Antonio, while one of the system's first general managers was also a city manager.

Improved performance

Between the improved performance of cable operators in the urban marketplace and their healthier relationship with city administrators, it's no wonder the industry is bullish about its future in the urban environment. While the market remains unique in terms of its marketing requirements and operational processes the industry has gained almost five years experience in running such systems. Even those systems that are generally considered to be "in trouble" are on their way toward reorganization and recovery, according to several industry executives. Yet there are still potential crises

"SUPPORT"

"We switched out a Philadelphia independent for SuperStation WTBS because WTBS proved to us that they could give us the research and marketing support we needed.



Timothy P. Martin
Area General Manager
Tri-System (TKR)
Warren, New Jersey

They gave us programming comparisons that made the switch desirable to both subscribers and political leaders. Then they helped us with market research, launch support, a direct mail package, and more. Now we're getting letters from subscribers thanking us for making the decision. SuperStation WTBS made it easy for us to do the right thing."

MAKE THE SWITCH THAT MAKES A DIFFERENCE.

SuperStation WTBS

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San Antonio

ahead. Roger's Minneapolis system recently raised a yellow flag of warning that it was facing serious shortfalls in cash income over the coming year. And, despite TCI's extremely conservative approach to developing the Chicago market—the company is projecting only a 25 percent penetration rate in assessing its capital commitments to the city—the jury is still out on how successful that system will be.

Nevertheless, industry executives like TCI's Peter Barton and Warner's John Fowler are confident in the market, the industry and the companies that are trying to forge ahead into the complex world of urban newbuilds. Barton said he's willing to bet anyone at least $100 that existing urban franchises that are "less than robust" (read—"in trouble") at this time will all be healthy businesses in three years.

$450 million gamble

Fowler was willing to make a bit more expensive bet. He and his high-flying colleagues at Warner Amex were willing to put up at least $450 million on the gamble that Warner Cable would be a successful business in the future. As Fowler sees it, the urban marketplace is the industry's future. Once all the top 10 media markets are wired in 1988 or 1989, he believes television viewing habits will change substantially. That belief is based on Qube measurements on more than 500,000 households that showed that whenever cable is available, the broadcast networks never got even 50 percent of the viewing audience.

These findings portend major changes not only in viewing habits, but in the advertising community as well, which will necessarily re-evaluate the network advertising environment. Cable systems are likely to see a burst of advertising revenues at that time and cable networks are likely to seek to position themselves on lower channels.

"In the long run, urban systems will be at least as profitable, if not more so, than the little cable systems in backwoods America," said the former Warnerexecutive. "These systems require a level of service that is much higher than older cable systems, but if you deliver it, you get higher revenues, higher cash flows. While the margins on cash flow are not there yet, they will be as these systems really begin to mature.

"I've spent a lot of time thinking about all this," concluded Fowler. "Why do you think I wanted to buy the company?" ■

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CABLE STATS

Cable Industry Growth Chart

YEAR	TVHH	Homes Passed	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990E	93,900,000	81,783,000	50,706,000	54	32,959,000	35
1989E	92,800,000	79,109,000	48,256,000	52	30,883,000	33
1988E	91,000,000	75,833,000	45,500,000	50	28,665,000	32
1987E	89,300,000	71,137,000	41,971,000	47	26,022,000	30
1986E	87,800,000	68,121,000	39,510,000	45	24,101,000	27
1985	86,304,000	64,571,000	36,120,000	42	21,672,000	25
1984	84,600,000	59,989,000	32,994,000	39	19,764,000	23
1983	83,500,000	53,641,000	30,300,000	36	17,877,000	21
1982	82,800,000	49,100,000	28,200,000	34	15,898,000	19
1981	80,700,000	44,000,000	22,596,000	28	11,804,000	15
1980	77,800,000	37,300,000	18,672,000	24	7,780,000	10
1979	76,300,000	32,700,000	16,023,000	21	5,341,000	7
1978	74,500,000	27,200,000	14,155,000	19	2,980,000	4
1977	73,300,000	24,894,000	13,194,000	18	1,466,000	2
1976	71,114,000	21,989,000	12,094,000	17	505,000	1
1975	69,600,000	19,900,000	11,136,000	16	N/A	N/A

Source: CableProFile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH.

Cable barometer

Television households (TVHH) 86,304,000

Homes passed by cable (HP).....64,571,000

Percent of TVHH passed by cable 74.7%

Basic cable subs 36,120,000

Percent of TVHH with basic cable 41.8%

Percent of HP with basic cable 56.0%

Pay cable subs 21,672,000

Percent of TVHH with pay cable.....25.1%

Percent of HP with pay cable.....33.6%

Percent of basic subs with pay cable 60.0%

Source: CableProFile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH.

Satellite lineup

Satcom III-R (RCA Americom) — **Transponder**

Arts & Entertainment....24
BET....20
Cable Radio Network....4
CBN Cable Network....8
Cinemax (West)....23
ESPN (Blackout)....7
Eternal Word Television Network....12
Financial News Network....4
Genesis Storytime....8
HBO (West)....13
HSN2....2, 16
HTN....16
Home Shopping Network....22
The Learning Channel....2
Lifetime....17
MTV....11
National Jewish Television....18
Nickelodeon....1
PTL....2
Reuter Monitor Service....18
Showtime (West)....10
Studioline....19
Tempo Television....6
TV Decisions....24
Trinity Broadcasting Network....3
Video Hits One....15
Viewer's Choice....5
The Weather Channel....21

Satcom IV (RCA Americom) — **Transponder**

American Movie Classics....10
Biznet....6
Bravo....2
C.O.M.B. Value Network....2
Hit Video USA....18
Home Sports Entertainment....11
Home Team Sports....22
Innovations In Living (HSN2)....1
Liberty Broadcasting Network....7
Madison Square Garden....6
New England Sports Network....13
Nickelodeon (West)....4
Nostalgia Channel....21
The Playboy Channel....12
Praico TV Shopper's Showcase....14
Prime Ticket....20
Rock Christian Network....3
The Silent Network....8
SportsVision....9
WPIX—New York....19

Westar III (Western Union) — **Transponder**

CNN....5

Westar IV (Western Union) — **Transponder**

Atlantic City Horse Racing....6
Cable News Network (CNN)....16
Catholic Telecommunications Network of America....11
Public Broadcasting Service....15, 17, 21, 23
Texas State Network....2
Word of Faith Satellite Network....6

Telstar 303 (AT&T) — **Transponder**

American Extasy....19
Country Music Television (CMTV)....18
KTVT (Dallas)....22
SelecTV....13

Galaxy I (Hughes) — **Transponder**

Alternate View Network....22
CBN Cable Network....11
Cinemax (East)....19
CNN....7
C-SPAN....13
The Discovery Channel....22
The Disney Channel (East)....4
(West)....24
EPG....3
ESPN....9
GalaVision....20
HBO (East)....23
Headline News....8
Keyfax National Teletext Magazine....18
Moody Broadcasting Network....3
The Movie Channel (East)....10
(West)....14
The Nashville Network....2
PTL....17
Seeburg Adult Contemporary....3
Seeburg Contemporary Instrumental....5
Showtime (East)....5
SIN....6
Studioline....13
WGN....3
WOR-TV....15
WTBS....18

Galaxy III — **Transponder**

The Meadows Racing Network....17

Note: A company name in parentheses following a service or network designates the transponder owner.
Source: International Thomson Communications Inc.

Top 100 MSOs

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	3,778,621	(11/85)
2.	American Television and Communications Corp.	2,700,000	(12/85)
3.	Group W Cable	2,162,000	(10/85)
4.	Continental Cablevision	1,186,000	(4/86)
5.	Storer Cable Communications	1,546,000	(3/86)
6.	Cox Cable Communications	1,331,814	(5/86)
7.	Warner Cable Communications Inc.	1,158,805	(10/85)
8.	United Cable	999,000	(3/86)
9.	Newhouse Broadcasting	972,377	(4/86)
10.	Times Mirror Cable Television Inc.	893,374	(2/86)
11.	Viacom Cablevision	829,000	(1/86)
12.	Jones Intercable	772,148	(5/86)
13.	UA Cablesystems Corp.	735,431	(2/86)
14.	Heritage Communications Inc.	725,425	(4/86)
15.	Sammons Communications Inc.	708,609	(12/85)
16.	Cablevision Co.	601,300	(2/86)
17.	Rogers Cablesystems Inc.	583,369	(11/85)
18.	Comcast	568,711	(3/86)
19.	Telecable Corp.	467,941	(3/86)
20.	McCaw Communications	379,800	(4/86)
21.	Post-Newsweek	360,000	(2/86)
22.	Centel Cable	3..0,000	(5/86)
23.	Prime Cable Corp.	346,023	(12/85)
24.	Cable Vision Industries	330,883	(4/86)
25.	American Cablesystems Corp.	323,187	(4/86)
26.	Century Communications Corp.	318,060	(12/85)
27.	Wometco Cable TV Inc.	308,427	(7/85)
28.	Falcon Cable	302,000	(6/86)
29.	Daniels & Associates	299,227	(4/86)
30.	Multimedia Cablevision	278,113	(5/86)
31.	Scripps Howard	269,183	(4/86)
32.	TCA Group	255,869	(5/86)
33.	Tribune Cable Communications	245,079	(3/86)
34.	Maclean Hunter Cable TV Ltd.	233,871	(12/85)
35.	Colony Communications Inc.	216,320	(7/85)
36.	Adelphia Communications	210,898	(5/86)
37.	Rollins Cableview Inc.	208,000	(4/86)
38.	Service Electric Cable TV Inc.	195,000	(12/85)
39.	Communications Service Inc.	179,000	(2/85)
40.	Western Communications	175,845	(12/85)
41.	TKR Cable Co.	172,026	(3/86)
42.	Sutton Capital Corp.	166,561	(2/86)
43.	Cablentertainment	161,436	(11/85)
44.	TCI-Taft	161,138	(2/86)
45.	Rifkin & Associates	155,193	(2/86)
46.	Adams-Russell Communications	151,449	(5/86)
47.	Cencom Cable	150,867	(5/86)
48.	Harte-Hanks Communications	144,514	(2/86)
49.	Harron Communications	132,644	(7/85)
50.	Buckeye Cablevision	126,047	(4/86)
51.	Lenfest Group	125,731	(2/86)
52.	Greater Media Cable	124,662	(3/86)
53.	Harris Cable Corp.	122,955	(4/86)
54.	Armstrong Utilities	120,061	(2/86)
55.	Televents Inc.	117,787	(3/86)
56.	Sonic Communications	109,916	(3/86)
57.	Summit Communications	109,775	(5/86)
58.	Media General Inc.	107,440	(2/86)
59.	Communications Systems Inc.	107,000	(4/86)
60.	The Essex Group	105,166	(5/86)
61.	Multi-Channel TV Cable Inc.	101,874	(4/86)
62.	U.S. Cable Corp.	98,900	(3/86)
63.	First Carolina Communications Inc.	94,100	(2/86)
64.	Simmons Communications	91,890	(2/86)
65.	King Videocable	91,373	(4/86)
66.	Perry Cable TV Corp.	90,215	(1/86)
67.	McDonald Group	90,079	(8/84)
68.	Marcus Communications	83,888	(4/86)
69.	Cable Management Associates	88,201	(1/86)
70.	WEHCO Video Inc.	83,51	(1/86)
71.	Booth Communications	82,482	(8/85)
72.	Marcus Communications	83,888	(4/86)
73.	Palmer Communications	80,449	(7/85)
74.	Midcontinent Cable Systems Co.	75,848	(5/86)
75.	Omega Communications	74,213	(6/85)
76.	Susquehanna Broadcasting	72,235	(1/86)
77.	Pencor Services Inc.	71,525	(2/86)
78.	Northland Communications Corp.	68,000	(4/86)
79.	Clear TV Cable Associates Ltd.	63,024	(2/86)
80.	Seltzer Communications	62,000	(2/86)
81.	National Telecommunications Corp.	61,625	(1/86)
82.	The Daily Press	60,100	(6/86)
83.	Marsh Media	57,698	(7/85)
84.	Helicon Corp.	55,000	(2/86)
85.	Mountain Cable Co.	55,000	(4/86)
86.	Masada Corp.	54,570	(2/86)
87.	Acton Corp.	54,529	(2/86)
88.	United Video Management	51,120	(2/86)
89.	Wisconsin Cablevision and Radio Co.	49,153	(1/86)
90.	Chambers Cable Comm. Inc.	48,643	(4/86)
91.	Communicom	47,694	(1/85)
92.	State Cable TV	45,922	(3/86)
93.	Bresnan Communications Co.	44,800	(2/86)
94.	Tele-Media	44,506	(7/85)
95.	Joseph Gans Cable T.V.	43,838	(3/85)
96.	Cable Holdings Inc.	42,344	(2/86)
97.	Danrey Cablevision	42,259	(2/86)
98.	Dowden Communications	42,100	(4/86)
99.	North American Comm. Corp.	37,710	(6/86)
100.	Eastar Communications	35,630	(4/86)

Subscriber counts are provided by MSOs and systems to International Thomson Communications Inc. Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to CableVision, Attention Cable Stats, P.O. Box 5208-T.A., Denver, CO 80217.

Top 100 systems

Rank	Location	Operator	Basic subs	
1.	Woodbury (Long Island), NY	Cablevision Co.	342,783	(4/86)
2.	San Diego, CA	Cox Cable	264,963	(11/85)
3.	Manhattan, NY	ATC	219,600	(12/85)
4.	San Antonio, TX	Rogers	200,503	(5/86)
5.	Houston, TX	Warner	192,536	(6/86)
6.	East Orange, NJ	Maclean Hunter	183,000	(5/86)
7.	Honolulu, HI	ATC	164,300	(12/85)
8.	Puget Sound, WA	Viacom	163,693	(5/86)
9.	Louisville/Jeff Co., KY	Storer Communications	147,000	(3/86)
10.	Wayne, NJ	UA Cablesystems	144,328	(12/85)
11.	Phoenix, AZ	Times Mirror	142,000	(7/85)
12.	Tulsa, OK	United Cable	140,320	(6/86)
13.	Cincinnati, OH	Warner	137,000	(8/85)
14.	Audubon, NJ	NYT	133,316	(5/86)
15.	Englewood, CO	United Cable	133,000	(10/85)
16.	Plainville/Hartford	United Cable	130,000	(10/85)
17.	Florida Division (Orlando/Ormond Beach)	ATC	128,100	(12/85)
18.	Seattle, WA	Group W	127,000	(5/86)
19.	Atlanta, GA	Prime Cable Corp.	125,319	(5/86)
20.	Tidewater (Norfolk), VA	Cox Cable	124,961	(11/85)
21.	Rochester, NY	ATC	123,500	(12/85)
22.	Baltimore County, MD	Comcast	120,725	(5/86)
23.	Erie County, NY	Prime Cable Corp.	119,002	(11/85)
24.	Manhattan, NY	Group W	115,000	(5/86)
25.	Kansas City, MO	ATC	114,600	(12/85)
26.	St. Louis Co., MO	Cencom Cable	111,063	(1/86)
27.	Jacksonville, FL	Continental	110,000	(6/85)
28.	San Jose, CA	Gill Industries	110,000	(5/86)
29.	Warren, NJ	TKR	110,000	(5/86)
30.	Austin, TX	ATC	109,700	(12/85)
31.	Memphis, TN	ATC	106,800	(12/85)
32.	San Juan, PR	Harris Cable Corp.	104,728	(4/86)
33.	Toledo, OH	Buckeye Cablevision	103,382	(4/86)
34.	Los Angeles, CA	Falcon	102,869	(4/86)
35.	Central Islip (Long Island), NY	Viacom	103,000	(9/85)
36.	San Francisco, CA	Viacom	98,300	(5/86)
37.	Fairfax, VA	Media General	97,420	(2/86)
38.	Jefferson Parish/Kenner, LA	Cox Cable	97,220	(11/85)
39.	Southeast Michigan	Comcast	94,000	(4/86)
40.	Wilmington, DE	Rollins Cableview	93,000	(4/86)
41.	San Diego, CA	ATC	92,200	(12/85)
42.	Seattle, WA	Viacom	92,000	(9/85)
43.	Grand Rapids, MI	General Electric	88,818	(5/86)
44.	Pompano, FL	American	88,440	(4/86)
45.	Dallas, TX	Heritage	85,797	(4/86)
46.	Pittsburgh, PA	Tele-Communications Inc.	84,517	(6/86)
47.	Dade/Broward, FL	Storer	82,000	(3/86)
48.	Richmond/Henrico, VA	Continental	81,678	(4/86)
49.	Indianapolis, IN	Indianapolis Cablevision Inc.	80,969	(5/86)
50.	Jackson, MS	ATC	80,700	(12/84)
51.	Wichita, KS	Multimedia Cablevision	80,158	(7/85)
52.	New Orleans, LA	Cox Cable	79,914	(11/85)
53.	Charlotte, NC	ATC	78,700	(12/85)
54.	Clearwater, FL	Vision Cable	78,600	(7/85)
55.	Flint, MI	Comcast Cable	77,208	(3/86)
56.	South Texas, TX	Heritage	76,931	(4/86)
57.	Baton Rouge, LA	Cablevision Co.	76,518	(12/85)
58.	Tacoma, WA	Cable TV of Puget Sound	76,132	(5/86)
59.	Boston, MA	Cablevision	75,524	(3/85)
60.	Chicago, IL	Group W	75,000	(4/86)
61.	Santa Monica, CA	Group W	74,000	(5/86)
62.	South Bend, IN	Heritage	72,911	(4/86)
63.	Las Vegas, NV	Times Mirror	70,091	(5/86)
64.	Cleveland Heights, OH	Viacom	70,000	(9/85)
65.	Allentown, PA	Service Elec.	70,000	(5/86)
66.	Greensboro, NC	ATC	69,200	(12/84)
67.	Omaha, NE	Cox Cable	67,917	(11/85)
68.	Chicago, IL	Group W	66,446	(12/85)
69.	Nashville, TN	Viacom	66,426	(5/86)
70.	Raleigh, NC	ATC	65,800	(12/84)
71.	Columbus, OH	Warner	64,679	(3/85)
72.	St. Petersburg, FL	Group W	64,478	(5/86)
73.	Indianapolis, IN	ATC	64,000	(12/85)
74.	Syracuse (suburbs), NY	NewChannels Corp.	63,899	(12/85)
75.	Buffalo, NY	Tele-Communications Inc.	63,898	(8/85)
76.	Akron, OH	Warner	63,500	(7/85)
77.	Des Moines, IA	Heritage	63,377	(4/86)
78.	Boston Complex (Medford), MA	Warner	63,150	(3/85)
79.	New Haven, CT	Storer	62,900	(3/86)
80.	Hartford, CT	Times Mirror Cable	62,882	(7/85)
81.	Monterey, CA	Western Communications	62,847	(12/85)
82.	Fayetteville, NC	ATC	62,100	(12/84)
83.	Madison, WI	Tele-Communications Inc.	62,099	(5/86)
84.	El Paso, TX	Group W	62,000	(10/85)
85.	Las Vegas, NV	Times Mirror Cable	61,892	(7/85)
86.	Santa Barbara, CA	Cox Cable	61,417	(11/85)
87.	Contra Costa Cty. CA	Televents	61,000	(5/86)
88.	Snohomish County, WA	Viacom	61,000	(9/85)
89.	Oklahoma City, OK	Cox Cable	60,836	(11/85)
90.	West Palm Beach, FL	Group W	60,000	(7/85)
91.	Mt. Prospect, IL	Cablenet	60,000	(3/85)
92.	Sarasota, FL	Storer	59,500	(3/86)
93.	Birmingham, AL	ATC	59,400	(12/84)
94.	Albany, GA	Storer	59,000	(3/86)
95.	Ft. Worth, TX	Sammons Communications	59,000	(7/85)
96.	Oakland County, MI	United Cable	59,000	(10/85)
97.	Harrisburg, PA	Sammons Communications	58,600	(7/85)
98.	Westchester, CT	UA Cablesystems	58,380	(2/86)
99.	New Britian, CT	United Cable	58,282	(12/84)
100.	Bridgeport, CT	Cablevision Co./ Scripps Howard	57,886	(7/85)